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AUTHOR Soares de Melo, Alvaro; Cristovao, Artur F. A. C.
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IDENTIFIERS *Portugal

ABSTRACT

The case descriptions of two adult education programs in Portual contained in this document are part of a set that reflects a cooperative effort by adult educators to increase international understanding of various educational programs for adults in their societal context. A face sheet for each program provides this information: name, organization, and address of the person who prepared the case description; program name or title; type of program; type of organization with which the case program is associated; and basic characteristics of service. The first of the two case descriptions, prepared by H.S. de Melo, discusses Management Groups as Method of Rural Extension; Study of Rural Extension Program Evaluation in the Agrarian Zone of Tras-os-Montes, was prepared by Artur F.A.C. Cristovao. In addition to the case descriptions, this document includes information on the World Perspective case study project, indexes of all cases by country and by category, and guidelines for contributors. (YLB)

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ED311181

WORLD PERSPECTIVE CASE DESCRIPTIONS ON EDUCATIONAL PROGRAMS FOR ADULTS: PORTUGAL

AUGUST 1989

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

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August, 1989

WORLD PERSPECTIVE CASE DESCRIPTIONS OF EDUCATIONAL PROGRAMS FOR ADULTS

PREFACE

This set of case descriptions reflects an inspiring cooperative effort by adult educators in many countries to increase international understanding of various educational programs for adults in their societal context. The benefits from reading these case descriptions result from the contributions of case coordinators and authors who arranged for and prepared the descriptions included in the set.

Cooperating case coordinators contributed in several important ways. In addition to sometimes writing one or more case descriptions, coordinators arranged for case authors. The selection of program areas and case authors reflects the case coordinators' professional judgment based on familiarity with educational programs for adults in their country. The list of names and addresses of case coordinators for each country is noted on green paper following the Table of Contents.

The names and addresses of case authors are on the face sheet that precedes each case description. Each case description is unedited and unchanged, in the form that the author submitted it. The few case descriptions that were translated into English are so noted.

As an aid to comparative analysis, each case coordinator was sent a set of guidelines, to be shared with case authors as they prepared their case descriptions. At the start of the project, active case coordinators received draft guidelines and their comments were used to revise the guidelines used in the project. These guidelines are included at the end of the set of cases and are printed on blue paper. Many authors were very conscientious in following

the guidelines. Even those case descriptions that depart from the suggested format contain useful information about the program.

Each case coordinator who submitted case descriptions has been sent a complete set. This international set of cases can be useful for comparative analysis in several ways. Some coordinators have indicated their intent to contact coordinators in other countries, to collaborate on cross national analysis for specific programs. Within a country, these may be colleagues and students who would like to conduct comparative analysis studies. In at least four countries, all of the case descriptions for that country are being disseminated to interested adult educators in the country.

Arrangements have been made to send a complete set of case descriptions that have been received by the end of the project late in 1988, to the ERIC Clearinghouse on Adult, Career, and Vocational Education at Ohio State University, USA, so that print or microfiche copies can be obtained by anyone interested. All cases from each country have been grouped together as a set on one ERIC document and the set was given an ED number. Therefore, you or other people can purchase microfiche or paper copies of the set for any country in the World Perspective series. For a list of ED numbers and prices for each of the sets, write to the ERIC Clearinghouse on Adult, Career, and Vocational Education, 1960 Kenny road, Columbus, Ohio 43210-1090, USA, ATTN: World Perspective Case Descriptions of Educational Programs for Adults. In response, a listing and order form will be sent.

Many people and organizations have helped with this largely volunteer project, in addition to the fundamental contributions by the case coordinators and authors. Support from the W. K. Kellogg Foundation made feasible many logistical arrangements including duplicating and postage. Many people prominent in adult education internationally were generous with advice and suggestions concerning potential case coordinators. The International Council

for Adult Education provides a vehicle for continued contact among all of us interested in cross national adult education research and understanding.

ACCESSING THE CASE MATERIAL

The organization of this great stack of cases is intended to facilitate their use. (The case coordinators now know why a paperweight was selected as a form of recognition.)

The Table of Contents (which is on pink paper following this Preface) is sequenced by country in alphabetical order by category, as are the full set of cases. Reviewing all cases from a country is easy because they are grouped together. The cases are on three hole paper for ease in grouping and adding more cases.

The numbering of cases is as follows. The first (or two digit) number designates the country (Australia is 2, Ireland is 22, etc.) and a list of country codes follows (missing numbers in the sequence are for countries from which cases have not yet been received).

1 - Argentina
2 - Australia
4 - Cameroon
5 - Canada
6 - China
7 - Chile
9 - Czechoslovakia
13 - Finland
15 - Germany, Federal Republic
16 - Ghana
17 - Greece
19 - Hong Kong
20 - Hungary
21 - India
22 - Ireland
23 - Israel
24 - Italy
23 - Israel
24 - Italy
25 - Japan
26 - Korea, Demo. People's Republic
29 - Netherlands
30 - Nigeria
31 - Norway
33 - Portugal
34 - Saudi Arabia
35 - St. Lucia
36 - Sweden
37 - Switzerland
38 - Tanzania
40 - United Kingdom
41 - United States
42 - Union of Soviet Socialist Republics
45 - Yugoslavia

Following the country code, each case has been given an alphabetic code (A,B,C,etc.) to distinguish that case from the others. A slash "/" follows the alphabetic code. Following the "/" is the pagination with the first page

consisting of the Face Sheet that authors were asked to complete. The coded pagination is on the lower right hand corner of each sheet of paper.

Following the Table of Contents, is an Index (on blue paper) organized by Category of Case. This allows readers interested only in cases in a specific category (such as Literacy or Citizen) to easily locate them. Because some cases are indexed in several categories, they are cross indexed for all categories that apply. The categories and criteria for determining the category follows. Because authors usually selected the category(ies) for their case and may not be consistent across all cases, it may be desirable to consult several pertinent categories.

A. LITERACY - Functional literacy and adult basic education programs (as defined in each nation) with special attention to literacy campaigns, local community groups, role of schools and efforts to include types of adults often neglected, such as prisoners.

B. AGRICULTURE - Extension programs to help farmers and peasants improve productivity (subsistence and cash) and quality of rural life with special attention to efforts by local community groups, ministry of agriculture and agricultural schools and colleges.

C. WORKERS - Educational programs to increase productivity and job change of all types of urban business and industry workers (aside from professionals), with special attention to efforts by enterprises, employers workers universities, labor unions, and trade associations.

D. PROFESSIONAL, TECHNICAL - All types of professional development and in-service programs for people in scientific and technical occupations such as engineering, and medicine, with special attention to efforts by universities, professional associations, and enterprises (factories, hospitals).

E. PROFESSIONAL, OTHER - Continuing professional education activities for any other types of occupations, that tend to be less influenced by new research findings (such as law, social work, teaching).

F. SECONDARY - Part-time secondary school completion programs, with special attention to efforts by schools and ministry of education.

G. HIGHER - Part-time or short term college and university completion programs for working adults, with attention to ministry of education and higher education institutions. In some nations this category may include part-time pursuit of formal credit and degree programs.

H. HEALTH - Preventative and curative health education programs for adults in urban or rural areas, with attention to efforts by ministry of health and local hospitals and clinics.

I. FAMILY - Family life and home economics education (including food preparation, nutrition, child development, and family relations), with attention to local providers.

J. PERSONAL - All types of educational activities related to leisure time, hobbies, arts, cultural affairs, personal enrichment, and general education, with attention to efforts by ministry of culture, and local libraries and museums.

K. CITIZEN - Educational activities related to community and organizational leadership and problem solving to enable adults to become more informed and participating citizens at local or wider levels to reform or sustain government, with attention to government, educational institutions, and voluntary associations. This may include international issues.

L. DISADVANTAGED - Special or compensatory educational programs for adults who are in hard to reach populations such as people with handicaps or a history of discrimination.

M. OTHER - Any other type of educational program for adults that is important in your nation, for which someone will prepare a case description, such as adult religious education or other examples.

(NOTE: Some important programs combine several categories. For example, in Latin America, popular education may include program emphases from categories A, B, C, K).

OVERVIEW OF AE IN COUNTRY OR REGION

The cooperation and exchange already evidenced in the preparation of this set of case descriptions, combined with the plans for analysis and continued colleagueship, suggests a great potential for ongoing sharing and international understanding. We hope to hear from you.

Alan B. Knox
Dusan Savicevic

For additional information contact: Alan B. Knox, Project Director
264 Teacher Education Bldg.
University of Wisconsin
225 N. Mills Street
Madison, WI 53706, USA

CASE DESCRIPTIONS - BY COUNTRY

CODE/ PAGE NO.	COUNTRY	CATEGORY	TITLE	AUTHOR
*1A/1-8	ARGENTINA	Overview	Adult Education in Latin America	Isabel Hernandez
*1B/1-7		Disadvantaged	Education and Elders	Isabel Hernandez
2A/1-26	AUSTRALIA	Agriculture	Farm Manage. Home Study Program	Barry O'Neill
2B/1-10		Citizen	Increasing Citizen Participation in Local Government	Bob Holderness-Roddam
2C/1-11		Disadvantaged	School for Seniors	Olga Benham & Sue Vickers
2D/1-16		Disadvantaged	Community Living Project	Kath Bleechmore
2E/1-12		Disadvantaged	Learning for the Less Mobile	Judith Elsworth
2F/1-9		Disadvantaged	UNElearn Group Discuss. Correspond. Programme	Ned Iceton
2G/1-15		Disadvantaged	Women's Access Prog.	Helen Lanauze
2H/1-37		Disadvantaged	Aboriginal Vill. Comm.	Natascha McNamara
2J/1-12		Family	Marriage Enrichment	David Kerr
2K/1-22		Health	Women's Health--The Middle Years	Deirdre Degeling, Diane Bennett, Fran Everingham
2L/1-9		Higher	Preparatory Studies	Michael Crock & Caroline Cottman
2M/1-15		Leisure	Discussion Program--Council of Ad. Ed.	Joanne Lee Dow
2N/1-9		Leisure	CCE Community Education Program	Bettina Fiegel
2P/1-15		Literacy	NSW Board of Adult Ed.--Literacy	Rosie Wickert

*New cases received since March 1988.

CODE/ PAGE NO.	COUNTRY	CATEGORY	TITLE	AUTHOR
2Q/1-10	AUSTRALIA	Personal Citizen	Carringbush Library	Marian Letchen
2R/1-11		Professional, Other	Refresher Ed. for Company Directors	John Brady
2S/1-12		Professional, Other, Family Citizen	Social Developer's Network	Ned Iceton
2T/1-6		Professional, Other	Welcare Program	J. A. McDonell
2U/1-5		Professional, Tech.	CPE for Veterinarians	D. Bryden
2V/1-17		Professional, Tech.	Country Pediatric Program	Hank Duyverman
2W/1-27		Workers	Trade Union Postal Courses Scheme	Elizabeth Bluff
2X/1-11		Workers Literacy	Workplace Basic Ed. Project	Jude Newcombe, et al.
*2Y/1-2		Literacy	Adult Migrant Education	William McGrath
*2Z/1-11		Personal	Self-Help Adult Education: Univ. of the Third Age	Rick Swindell
4A/1-11	CAMEROON	Agriculture	AE Progs. in Cameroon	J. A. Nyemba
4B/1-18		Agriculture	Agriculture Univ. Center in Extension Program Implementation	J. A. Nyemba

CODE/ PAGE NO.	COUNTRY	CATEGORY	TITLE	AUTHOR
5A/1-10	CANADA	Citizen	Buchans Community Trans. Proj.	David Curran
5B/1-16		Citizen Workers	Canada Congress for Learning Opportunities for Women	Caroline A.Gaskin
5C/1-11		Health Workers	Health Line: Centre for Corp. Health Promotion	Dale I. Pratt
5D/1-8		Higher	Distance Ed. at U. Victoria	Margaret Haughey
5E/1-20		Literacy	Bathurst Heights Ad. Learning Centre	E. Elysee-Cohen
5F/1-10		Literacy	East End Literacy	Elaine Gaber-Katz
5G/1-45		Literacy	Learner-Centred Social Services Model of ABE	Patricia A.Rundle
5H/1-22		Other	Residential AE in Canada	Wenda Abel
5J/1-16		Professional, Tech.	Self Dir. Learning App. to the Training of Medical Doctors	Lynne McTaggart
5K/1-18		Professional, Tech.	CPE Program for Family Physicians	Penny A. Jennett
*5L/1-13		Literacy	International: Literacy and Development	James A. Draper
*7A/1-29	CHILE	Agriculture	Centro El Canelo De Nos	Patricio Donoso
*7B/1-12		Agriculture	Chile: An Experiment in Nonformal Education in Rural Areas	Marcela Gajardo
6A/1-18	CHINA	Overview	Chinese Adult Education--At Present and in Prospect	Dong Mingchuan & Zhu Zhongdan
6B/1-25		Overview	Aging Issue and Education for the Aged	Dong Mingchuan & Zhu Zhongdan

CODE/ PAGE NO.	COUNTRY	CATEGORY	TITLE	AUTHOR
*6C/1-6	CHINA	Overview	Adult Education in Beijing Municipality	Fu Youren
*6D/1-8		Higher	A University Without Campus	Lin Jun
*6E/1-9		Workers	A Survey of Beijing's Workers University Graduates	Liu Yongqian
*6F/1-40		Overview	Postsecondary Education in China	Dong Mingchuan
*9A/1-34	CZECHOSLOVAKIA	Overview Workers	Czechoslovakian Adult Education	Kamil Skoda
*9B/1-12		Other	House of Culture and Its Function in Adult Education	Pavel Hartl
13A/1-17	FINLAND	Other	Experimentation in Ad. Ed. Centers	Mirja Virtala
13B/1-4		Other	Beginning of Ad. Ed. Planning at the Municipal Level	Jorma Kauppinen
13C/1-6		Other	Experiments in Voc. Ad. Ed.	Lea Salminen
13D/1-10		Professional, Other	Developmental Work Research Project at Adult Ed. Center	Ilona Koskela
13E/1-6		Workers	Union History Project: Study Circles Doing Research	Jorma Kalela
13F/1-10		Workers	School for Teaching ADP	Markku Suortamo
13G/1-4		Workers	Instruction in Info. Technology	Kerttu Vepsalainen
13H/1-5		Workers	Role of Training in Changing a Work Organization	Anneli Pulkkis Veikko Teikari Matti Vartiainen

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15A/1-11	GERMANY, FED. REP.	Agriculture	Counseling Courses in Agriculture	Helmut Bugl Felicitas Fehrenbach-Neuman
15B/1-11		Citizen	State Center for Political Ed.	Siegfried Schiele
15C/1-19		Health Family Personal Other	Catholic Ed. Organ.	Peter Muller
15D/1-18		Health Family Personal	Adult Ed. Center	Gabriele Werner
15E/1-14		Personal Disadvantaged	Voc. & Social Integration for Turkish Women	Susanne Meyder
15F/1-15		Professional, Tech.	Professional Training for Med. Specialists	Hans E. Renschler
15G/1-13		Professional, Tech.	In-service Training at Busch	Peter Kilgenstein
15H/1-17		Professional, Other Higher Personal	Courses by Radio	Peter Schmoock
15J/1-17		Professional, Tech. Professional, Other Higher	CE Center at Univ. of Tubingen	Rainer Funke
15K/1-11		Secondary	Evening High School	H. Taigel

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15L/1-11	GERMANY, FED. REP.	Workers	Center for Cont. Voc. Training, Chamber of Industry & Trade	Nils Peter Esmann Franz Bihler
15M/1-15		Workers	Cont. Ed. in Training Companies	Michael Eisenmann
15N/1-17		Workers Professional, Tech.	Human Resource & Organ. Dev.	Colin A. Guthrie
*15P/1-11		Personal	Women's Museum-Wiesbaden	Kim Engels Beatrixe Klein
16A/1-9	GHANA	Professional, Other	Training Teachers by Distance Education Methods	Joe K. Ansere
16B/1-33		Workers	Multi-media Appr. to Effective Teaching	Eric A. Mensah
*17A/1-18	GREECE	Professional, Other	In-service Teachers Training in Greece	Michael Kassotakis
19A/1-6	HONG KONG	Literacy	Literacy Program	Grace Mak
*20A/1-19	HUNGARY	Personal	Protecting Our Environment	Mihaly Sari
*20B/1-33		Workers	Realities of Our Time	Matyas Durko
21A/1-33	INDIA	Literacy	Literacy Program	R. Jayagopal
21B/1-4		Literacy	Punjab Association	R. Jayagopal

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21C/1-6	INDIA	Workers	National Council for Hotel Management and Catering Technology	R. Jayagopal
*21D/1-4		Health Family Citizen	Hayden Hall: A Community Development Approach	Fr. E. P. Burns
22A/1-14	IRELAND	Agriculture	Certification in Farming	Michael Hassett
22B/1-10		Citizen Professional, Other	Training of Comm. Enter. Animateurs	Tom Collins
22C/1-16		Family	Family Life Education Premarriage	Liam McCarthy
22D/1-16		Family Other	Pontifical U. Dipl. in Family Life & Youth Ministry	Elizabeth Murphy
22E/1-13		Health	Extra-mural Studies in Drug & Alcohol Addiction	Mary Ellen McCann
22F/1-10		Professional, Other	Extra-mural Studies	Mary Kett
22G/1-13		Other	Maynooth Adult Daytime Education	(MADE)
22H/1-13		Other	Extra-mural Diplo. Course in Religious Studies	Sr.Benedict Rouine
22J/1-10		Higher Personal Other	Irish Language TV Program	John MacMahon
22K/1-11		Professional, Other	Extra-mural Studies in Basic Counseling	Muireann Conaty

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22L/1-24	IRELAND	Professional, Other	Intro. Course to Ed. Administra.	P. B. Diggins
22M/1-16		Professional, Other	Training Part-Time Ad. Ed. at Local Level	James Marsden
22N/1-14		Professional, Other	Natl. Police Officer CE & Training	P. J. Moran
22P/1-11		Professional, Other Health	Teacher Training Prog.-Health Ed.	Eugene Donoghue
22Q/1-12		Workers	Diploma in Manag. & Industrial Relations	John Ryan
23A/1-14	ISRAEL	Family Citizen	School for Parents, Teachers & Children in a Distressed Moshav	Eitan Israeli
*23B/1-6		Literacy	Comparative Analysis of Literacy Education	Rachel Tokatli
24A/1-11	ITALY	Citizen	Public and Library: A Plan for the Education of Adults	Paolo Federighi
24B/1-10		Citizen Other	Education Project of Molise: Creation of an Ad. Ed. System	Francesco Susi
24C/1-11		Citizen Personal Other	Center for Cont. Ed. in Bassano de Grappa	Gianna Maria Filippi
24D/1-11		Citizen Other	Education for Adults in the Earthquake Region of Basilicata	Francesco Susi

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24E/1-10	ITALY	Other	Adult Education in Bologna	Mario Ricci
24F/1-18		Overview	Educational Aims for the Year 2000: Adult Education for the City of Prato	Filippo M. DeSanctis
24G/1-11		Personal	Provincial Administration of Moderna	Vanna Tori
24H/1-6		Personal	University of the Third Age-Orvieto	Lucio del Corno
*24J/1-6		Personal Citizen	Mass Media and Adult Education in Sardenia	Fabio Masala
25A/1-32	JAPAN	Citizen	Ed. and the Integration of Community Services	Kazufusa Moro'oka
*25B/1-13		Leisure	Citizen's Learning Network	Miwa Toko
*25C/1-20		Higher	The Founding of a University for Senior Citizens	Takashi Fukuchi
26A/1-12	KOREA, DPR	Overview Workers	Overview	Nam Jin U
29A/1-17	NETHERLANDS	Literacy	Open School	Maatje Balde
29B/1-17		Literacy	Study House for Adults	Emmy Wilson
29C/1-18		Literacy	Dutch as a Foreign Language	Emmy Wilson
29D/1-20		Literacy Disadvantaged	Dutch as a Foreign Language	E. R. T. Zuidhoff

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29E/1-17	NETHERLANDS	Other	Television Academy	Anja Dircken
29F/1-20		Professional, Other	Psycho-Geriatrics for Home Helps	Bea Oosting
29G/1-10		Professional, Other	In-service Occupational Training	R. Zuidhoff
29H/1-16		Professional, Tech.	Advanced Nursing Course	Henny Van Der Stel-Overdulve
29J/1-16		Professional, Tech.	Part-time Training - Sick Care	Henny Van Der Stel-Overdulve
29K/1-19		Professional, Tech.	In-Service Training - Basic General Nursing	Annette van den Berg-Ran
29L/1-19		Professional, Tech.	Part-time Course for Teachers of Nursing	Annette van den Berg-Ran
29M/1-13		Professional, Tech.	Improvements in Medical Practice	I. W. Dresscher
29N/1-9		Professional, Tech.	Practical Neurology	I. W. Dresscher
29P/1-23		Professional, Tech.	Medical Specialists	Bea Oosting
29Q/1-8		Workers	Occupational Retraining in Office Skills	Maatje Balde
*29R/1-28		Literacy	Language School for Refugees	E. Stark
*29S/1-17		Personal	Assertivity Course	G. Nijhof

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*29T/1-18	NETHERLANDS	Personal	Pre-Retirement Education	B. van Straalen-van Waard
*29U/1-20		Workers	Re-entry Course for Women in Construction Trades	R. de Ruiter
*29V/1-18		Workers	Management and Computer Education for Re-entry Women	E. Stark
*30A/1-50	NIGERIA	Literacy	Model Adult Literacy Classes	J. T. Okedara
*30B/1-43		Higher	Correspondence Education	J. T. Okedara
*30C/1-31		Higher	Remedial Education	J. T. Okedara
*30D/1-24		Health	Guinea Worm Eradication Program: Community Education in Nigeria	Clement N. Anyanwu
*30E/1-28		Professional, Other	Professional Continuing Education for Grade Two Teachers in Nigeria	C. A. Okedara
30F/1-20		Workers	Workers' Education in Nigeria	P. N. C. Ngwu
30G/1-40		Workers	Women Education in Oyo State, Nigeria	C. A. Okedara
31A/1-15	NORWAY	Professional, Other Higher	NKS School of Management (Correspondence School)	Tore Aksjoberg
*33A/1-35	PORTUGAL	Agriculture	Management Groups as a Method of Rural Extension	Alvaro Soares de Melo
*33B/1-27		Agriculture	Rural Extension Program Evaluation	Artur F.A.C. Cristovao
*35A/1-28	ST. LUCIA	Agriculture	Caribbean Agricultural Extension Program	Dunstan Campbell and Lorilee Sandmann

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34A/1-19	SAUDI ARABIA	Literacy	Illiteracy Eradication & Adult Education	Mohammed A. Al Rasheed, A. Al Sunbul
36A/1-8	SWEDEN	Literacy	Basic Education for Adults in Sweden	Per Olof Thang
36B/1-21		Higher	Distance Education at the Univ. Level	Birgitta Willen
36C/1-10		Secondary Overview	Perspective on Municipal Adult Ed.	Robert Hoghielm
36D/1-13		Workers	Corporate Classrooms	Kenneth Abrahamsson
36E/1-9		Workers	Labor Market Training in Sweden	Per Olof Thang
*36F/1-9		Citizen	Popular Education in Sweden	Lars Arvidsson
*37A/1-8	SWITZERLAND	Professional, Tech.	Formative Research in Swiss French Agric. Schools	Pierre Dominice Matthias Finger
38A/1-25	TANZANIA	Agriculture	Training for Rural Development	Aida Isinika
*40A/1-42	UNITED KINGDOM	Health	Heartbeat Wales	Donald Nutbeam
41A/1-7	U.S.A.	Agriculture	Coop. Ext. Service (Local)	Alan B. Knox
41A/8-30		Agriculture	Coop. Ext. Service (National)	William M. Rivera
41B/1-16		Citizen	Natl. Issues Forum	Alan B. Knox
41C/1-21		Citizen	Educational Programs for Government Officials	Harvey Schweitzer, Nancy Lauts, Charles Kozoll

CODE/ PAGE NO.	COUNTRY	CATEGORY	TITLE	AUTHOR
41D/1-9	U.S.A.	Disadvantaged	YWCA Refugee Program	Linda B. Knox
41E/1-15		Higher	Indiana U. Independent Study by Correspondence	Frank R.DISilvestro
41F/1-25		Literacy	Adult Basic Education	Alan B. Knox
41G/1-13		Health	Alcoholics Anonymous	Alan B. Knox
41H/1-28		Professional, Tech.	Continuing Medical Education	Thomas G. Pearson & Ronald M. Cervero
41J/1-11		Workers	Credit Union Staff Development	Alan B. Knox
*41K/1-11		Literacy	Libraries and Literacy--Tulsa	Debra W. Johnson
*41M/1-11		Literacy	Libraries and Literacy--Weirton	Debra W. Johnson
*41N/1-7		Professional, Other	Helping Stock Brokers Cope with Stress	Alan B. Knox
42A/1-17	U.S.S.R.	Other	ZNANIE Society	Yuri Fishevski
42B/1-9		Professional, Tech.	Continuing Medical Education	F. Vartanian, D. Orlov E. Nazarova
45A/1-16	YUGOSLAVIA	Agriculture	Vet. Ed. in the Farming Population	Branko Rebesko
45B/1-15		Agriculture Professional, Other	Ext. Service & Its Role in Training Farmers-Slovenia	Robic Tone
45C/1-13		Family Health	Nutrition Education	Mara Rupena Osolnik

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45D/1-11	YUGOSLAVIA	Literacy	Basic Adult Education	Radivoje Kulic
45E/1-27		Literacy Professional, Other	Research Into and Training In Literacy	Dusan M. Savicevic
45F/1-10		Literacy Workers	Correlation of Primary & Work Oriented Profess. Ed. of Young People	Dusan M. Savicevic
45G/1-29		Workers	Dev. of Training in Sava, Kranj	Ema Pec
*45H/1-19		Workers	Self Management at Worker's Universities	Milka Oljaca

CASE DESCRIPTIONS - BY CATEGORY

CODE/ PAGE NO.	CATEGORY	COUNTRY	TITLE	AUTHOR
2A/1-26	Agriculture	AUSTRALIA	Farm Manage. Home Study Program	Barry O'Neill
4A/1-11	Agriculture	CAMEROON	AE Progs. in Cameroon	J. A. Nyemba
4B/1-18	Agriculture	CAMEROON	Agriculture Univ. Center in Extension Program Implementation	J. A. Nyemba
*7A/1-29	Agriculture	CHILE	Centro El Canelo De Nos	Patricio Donoso
*7B/1-12	Agriculture	CHILE	Chile: An Experiment in Nonformal Education in Rural Areas	Marcela Gajardo
15A/1-11	Agriculture	GERMANY	Counseling Courses in Agriculture	Helmut Bugl Felicitas Fehrenbach-Neuman
22A/1-14	Agriculture	IRELAND	Certification in Farming	Michael Hassett
*33A/1-35	Agriculture	PORTUGAL	Management Groups As A Method of Rural Extension	Alvaro Soares de Melo
*33B/1-27	Agriculture	PORTUGAL	Rural Extension Program Evaluation	Artur F.A.C. Cristovao
*35A/1-28	Agriculture	ST. LUCIA	Caribbean Agricultural Extension Program	Dunstan Campbell and Lorilee Sandmann
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41A/1-7	Agriculture	U.S.A.	Coop. Ext. Service (Local)	Alan B. Knox
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2Q/1-10	Personal Citizen	AUSTRALIA	Carringbush Library	Marian Letchen
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15B/1-11	Citizen	GERMANY	State Center for Political Ed.	Siegfried Schiele
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24D/1-11	Citizen Other	ITALY	Education for Adults in the Earthquake Region of Basilicata	Francesco Susi

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*24J/1-6	Personal Citizen	ITALY	Mass Media and Adult Education in Sardinia	Fabio Masala
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41B/1-16	Citizen	U.S.A.	Natl. Issues Forum	Alan B. Knox
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*36F/1-9	Citizen	SWEDEN	Popular Education in Sweden	Lars Arvidsson
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2D/1-16	Disadvantaged	AUSTRALIA	Community Living Project	Kath Bleechmore
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22D/1-16	Family Other	IRELAND	Pontifical U. Dipl. in Family Life & Youth Ministry	Elizabeth Murphy
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*6D/1-8	Higher	CHINA	A University Without Campus	Lin Jun
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*25C/1-20	Higher	JAPAN	The Founding of a University for Senior Citizens	Takashi Fukuchi
*30B/1-43	Higher	NIGERIA	Correspondence Education	J. T. Okedara
*30C/1-31	Higher	NIGERIA	Remedial Education	J. T. Okedara
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*2Y/1-2	Literacy	AUSTRALIA	Adult Migrant Education	William McGrath
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5F/1-10	Literacy	CANADA	East End Literacy	Elaine Gaber-Katz
5G/1-45	Literacy	CANADA	Learner-Centred Social Services Model of ABE	Patricia A.Rundle
*5L/1-13	Literacy	CANADA	International: Literacy and Development	James A. Draper
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*23B/1-6	Literacy	ISRAEL	Comparative Analysis of Literacy Education	Rachel Tokatli
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*29R/1-28	Literacy	NETHERLANDS	Language School for Refugees	E. Stark
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*41K/1-11	Literacy	U.S.A.	Libraries and Literacy--Tulsa	Debra W. Johnson
*41M/1-11	Literacy	U.S.A.	Libraries and Literacy--Heirton	Debra W. Johnson
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*9B/1-12	Other	CZECHOSLOVAKIA	House of Culture and its Function in Adult Education	Pavel Hartl

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*6C/1-6	Overview	CHINA	Adult Education in Beijing Municipality	Fu Youren
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*20A/1-19	Personal	HUNGARY	Protecting Our Environment	Mihaly Sari
22J/1-10	Higher Personal Other	IRELAND	Irish Language TV Program	John MacMahon
*24J/1-6	Personal Citizen	ITALY	Mass Media and Adult Education in Sardinia	Fabio Masala
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24H/1-6	Personal	ITALY	University of the Third Age-Orvieto	Lucio del Corno

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*29S/1-17	Personal	NETHERLANDS	Assertivity Course	G. Nijhof
*29T/1-18	Personal	NETHERLANDS	Pre-Retirement Education	B. van Straalen-van Waard
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*41N/1-7	Professional, Other	U.S.A.	Helping Stock Brokers Cope with Stress	Alan B. Knox
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*30G/1-40	Workers	NIGERIA	Women Education in Oyo State, Nigeria	C. A. Okedara
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A WORLD PERSPECTIVE
CASE COORDINATORS WHO CONTRIBUTED CASE DESCRIPTIONS

ARGENTINA	Professor Isabel Hernandez, CONICET University of Buenos Aires Freire 2185 (Cod. 1428) Buenos Aires, ARGENTINA
AUSTRALIA	S. J. Rooth, Director Dept. of Continuing Education The University of New England Armidale, N.S.W. 2351, AUSTRALIA
CAMEROON	Professor Jean Nyemba Department of Rural Education University Center P. O. Box 222 Dschang, CAMEROON
CANADA	Professor James A. Draper OISE 252 Bloor Street West Toronto, Ontario CANADA M5S 1V6
CHILE	Marcela Gajardo FLACSO, P. O. Box 3213 Santiago, CHILE
CHINA	Dong Mingchuan, Deputy Director 3rd Dept. of High.Ed.,State Educ.Comm. The People's Republic of China 37 Da Mu Cang, Xidan Beijing, CHINA
CZECHOSLOVAKIA	Dr. Kamil Skoda Faculty of Philosophy Charles University Celetana 20 110 00 Prague, 1, CZECHOSLOVAKIA
FINLAND	Professor Jukka Tuomisto University of Tampere Dept. of Adult Education and Youth Work, P. O. Box 607 SF - 33101 Tampere 10, FINLAND

GERMANY, FEDERAL REPUBLIC	Professor Dr. G. Dohmen Institut fur Erziehungswissenschaft University of Tubingen Am Holzmarkt 7 7400 Tubingen 1 FEDERAL REPUBLIC OF GERMANY Dr. Jost Reischmann Institut fur Erziehungswissenschaft University of Tubingen Am Holzmarkt 7 7400 Tubingen 1 FEDERAL REPUBLIC OF GERMANY
GHANA	Dr. Joe K. Ansere c/o Institute of Adult Education University of Ghana P. O. Box 31 Legon, GHANA
GREECE	Professor Michael Kassotakis University of Crete Department of Education Rethymnon, Crete
HONG KONG	Charles Wong 45 Bayview Road Kentfield, CA 94904
HUNGARY	Professor B. Laszlo Harangi Kossuth Lajos tudomanyegyetem Debrecen 10. Pf.17 4010, HUNGARY
INDIA	Professor R. Jayagopal Dept. of Adult & Continuing Education Univ. of Madras, University Buildings Chepauk, Triplicane P.O. Madras, INDIA 600 005
IRELAND	Father Liam Carey, Director Centre for Adult & Community Education St. Patrick's College Maynooth Co. Kildare, IRELAND

ISRAEL	Professor Eitan Israeli Levi Eshkol School of Agr. P. O. Box 12 Rehovot 76-100, ISRAEL
ITALY	Professor Filippo M. DeSanctis via Thailandia, 12 00144 Roma, ITALY
JAPAN	Professor Kazufusa Moro'oka Faculty of Education Kyushu University 03 Res. Inst. of Comp. Ed. & Cult. Higashi-Ku, Fukuoka 812, JAPAN
KOREA, DEMO. PEOPLES REP.	Professor Nam Jin U Research Institute of Pedagogy Academy of Education Pyongyang, DPR of KOREA
NETHERLANDS	Professor Barry J. Hake Department of Adult Education State Univ. of Leiden, Vakgroep andrag. Rijnsburgerweg 157, Leiden NETHERLANDS
NIGERIA	Professor Joseph Okedara Chairman, Dept. of Adult Education Ibadan University Ibadan, NIGERIA
NORWAY	Professor Odd Nordhaug Norwegian School of Econ. & Bus.Admin. Institute of Organization Sciences Helleveien 30, N-5035 Bergen Sandviken, NORWAY
PORTUGAL	Eduardo Figueira Herdade da Mitra 7000 Evora, Portugal Artur Cristavao Universidade de Tras-os-Montes e Alto Douro - Centro de recursos de ensino e Aprendizagem Apt. 206, 5001 Vila Real Codex PORTUGAL

ST. LUCIA	Dunstan Campbell University of the West Indies c/o Ministry of Agriculture Castries, ST. LUCIA
SAUDI ARABIA	Dr. Mohammad Al-Rasheed Director General Arab Bureau for Education in the Gulf States Rhiydh, SAUDI ARABIA
SWEDEN	Dr. Robert Hoghielm Stockholm Institute of Education Department of Educational Research Box 34103, S-110 26 Stockholm SWEDEN
SWITZERLAND	Dr. Hans Amberg, Director Swiss Association for adult Education Oerlikonerstrasse 38 CH.8057, Zurich, SWITZERLAND
TANZANIA	Mrs. Aida Isinika TRDC, Ruaha P. O. Box 254 Iringa, TANZANIA
U.S.A.	Professor Alan B. Knox C.A.V.E., 264 Teacher Educ. Bldg. 225 N. Mills Street University of Wisconsin Madison, WI 53706
U.S.S.R.	Dr. Michail N. Kulis Research Institute of Adult Education USSR Academy of Pedagogical Sciences 8 Kutuzov Embarkment, Leningrad, D-11 191187, U.S.S.R.
YUGOSLAVIA	Professor Dusan Savicevic Bulevar Lenjina 143 Belgrade YUGOSLAVIA

Face Sheet
World Perspective on Adult Education

Case coordinators should have this face sheet completed for each case description of a current or recent adult education program that is sent for compilation to Alan B. Knox, 264 Teacher Education Building, University of Wisconsin, 225 N. Mills Street, Madison, Wisconsin 53706, USA.

1. Person who prepared this case description

   Name ÁLVARO SOARES DE MELO Phone number 1-735252

   Organization General Directorate of Planning and Agriculture

   Street Address Avenida 5 de Outubro, 85-9º

   City or Town LISBON 1000 State or Province _____

   Nation PORTUGAL

2. Check whether this case is based on

   ( ) an actual program

   ( ) a composite based on general familiarity with such programs

3. Write a brief title or name of this program to use to refer to it

   MANAGEMENT GROUPS AS A METHOD OF RURAL EXTENSION

4. Write the type of program, from Section III of the project plan, in which the program best fits (such as A. Literacy, B. Agriculture, C. Workers, etc). Agriculture

5. Type of organization with which the case program is associated (such as Ministry of Agriculture, local school, labor union, university, or clinic).

   MINISTRY OF AGRICULTURE

6. Basic characteristics of service area

   A. _____ geographic size (such as square miles or kilometers)

   B. _____ population (number of people living in area)

   C. _____ urban/rural (density of population)

   D. _____ nationwide

7. Year(s) covered by the case description _____

"MANAGEMENT GROUPS" AS A METHOD OF RURAL EXTENSION:
REPORT OF AN EXPERIMENT

A. Framework

The case presented here took place in one of the seven Regional Bureaus of Agriculture created from the division of the continental territory by the Ministry of Agriculture of Portugal. Considered here is the Regional Bureau of Agriculture of Beira Litoral, or DRABL. The work in two of the Agrarian Zones within this Bureau will be examined: the Agrarian Zones of Aveiro and of Gândaras.

The Regional Bureaus of Agriculture are primary divisions of the Ministry of Agriculture. They function at the level of the Agrarian Regions with a high degree of decentralization. The Agrarian Regions are, in turn, divided into Agrarian Zones that correspond to a set of political-administrative divisions called Councils. The Agrarian Zones and Councils have a certain number of similar characteristics. Direct support of the farmers is concentrated in the Agrarian Zones, where teams of extension agents, who are generalists, operate at the level of the Councils.

Rural extension services were officially created in Portugal in 1977; up to now, however, they have not reached levels of operation that could be considered satisfactory. The reasons for this lack of success are many and complex, among which are the following: 1) the profound political changes experienced in this country during this period; 2) changes in the structure of the official agricultural services, which went from a centralized administration at the national

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level to decentralization at the level of the Agrarian Regions. In order to establish themselves, the services in the Agrarian Regions either rejected or put conditions on the application of any methods coming from the specialized agricultural services at the national level; 3) the intent to create an extension service for the entire country all at once, by legislative means, instead of doing so gradually through the use of pilot zones; 4) the lack of sensitivity on the part of the political leaders to this type of work (which had no precedent in the country), seeing it as a way of justifying how the work had been conducted in the past instead of as a way to assist and increase activity in this area; 5) the actual method adopted, the "T & V," in which relationships with farmers were formed through "contact farmers" (certain farmers acting as intermediaries), which does not seem to have been an adequate way to develop a dynamic and interactive relationship between the farmers and the technical specialists.

The Bureau of Agricultural Management Services, basic unit of the Office of Rural Extension and central agency of orientation to regional service programs, began in 1979 the promotion and implementation of a management method for agricultural endeavors involving the organization of farmers into small groups of fifteen to twenty. Because the farmers in these groups are representative of the community, they are knowledgeable about their own systems of production, they test technological innovations in these same systems, and because they develop a group dynamic, they are true extension groups, valuable in lending support to the extension agents in their

mission of encouragement and the diffusion of innovations to the rural communities.

The utilization of management and farmers' groups as facilitating elements in the gradual development of agricultural endeavors to increase production and productivity and promote the general development of rural communities (used in some European countries such as Spain, where Portugal was inspired), was not, as in the extension, followed by the majority of the administrators of the Ministry of Agriculture. The extension services were not sensitive to nor did they realize the interest in their work, which is the reason that its diffusion throughout the country has been slow and uneven from region to region.

One notable exception is the Regional Bureau of Agriculture of Beira Litoral (DRABL), mentioned before. Its extension services have perceived the interest in this method and along with pressure from the farmers who use the method, have come to implement it in its various Agrarian Zones. For these reasons this Bureau has been chosen for study.

Within DRABL, the "contact farmers" of the "T & V" system have come to be replaced in their function by "management groups." It should also be mentioned that in DRABL's area of operation, this method has been adopted by teams of extension technical specialists belonging to cooperative organizations of farmers.

Summary Description of DRABL and the Agrarian Zones of Aveiro and Gândaras

Characteristics	DRABL	Aveiro	Gândaras
Geographic location	Central-West of Portugal	Central-West--Coastland	Central-West--Coastland
Administrative divisions-Councils	60	6	5
No. of agricultural endeavors > 0,5 ha	202.813	17.648	31.047
Area covered by agricultural endeavors (ha)	2,7	2,2	2,7
Average no. of "blocks" by agricultural endeavor	9,1	7,3	7,8
%of SAU irrigated	52,3	58,0	48,2
Avg. no. of CN cattle by agric. endeavor with cattle	1,9	2,7	1,9
Principal crops	corn, beans, potatoes, rye, fodder, vineyards, olives, pine	corn, potatoes, beans, fodder, hortícolas	corn, potatoes, beans, rice, vineyards, olives
Cattle	cows, sheep, goats swine	dairy cattle, swine	dairy cattle, swine
% of family agricul. endeavors	95,1	98,3	96,3
% of family agricul. endeavors on their own	64,8	48,3	61,9
Units of agricul. work avg. by endeavor	1,4	1,7	1,4
% of family farmers with yields more than 50% outside the endeavor	63	58	59
% of family farmers working in endeavors >54 years	31,7	27,4	31,7
% of family farmers working in endeavors > 15 and < 54 years	61,5	62,5	63,6
% of illiterate farmers	23	18	22

Note: Statistical Information: Agricultural Census of 1979--INE

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B. Results

1. Objective

The objective of this program is to provide a method to the extension services which allows them to function side by side with the more established farmers, always keeping in mind the goals of increased production, productivity and yield, a better quality of life for the farmers, and their direct and active participation in the process of rural development.

Since the organization of all farmers in a region into management groups would be possible only with difficulty, and in order to avoid the creation of privileged groups, the extension services should utilize data obtained in the management groups with which they work as references to assist them in their work of diffusion of information among the greatest number of farmers possible.

The program of implementation of management groups requires that each Agrarian Zone be assisted by two "promoters" specializing in the management of agricultural endeavors, who have the task of creating a dynamic group and lending specialized management assistance to the extension agents, who are generalists.

The goal is for each extension team (composed of two generalist extension agents) to work with a minimum of one group (fifteen to twenty farmers) and a maximum of four groups representing the various target populations and the various systems of cultivation existent in their area of operation. As mentioned before, in order to avoid group elitism and to increase the effectiveness of his efforts, the extension agent should never neglect to work with the remaining target

population, to whom he will report the positive results obtained in the core group.

These management groups will, after a certain amount of time, become institutionalized into "management centers," which are associations recognized by law and equal to the cooperatives in terms of benefits and state support. In the region under study two such instances of this have already been documented.

2. Benefits

The benefits obtained through the application of this method may be shown by the following:

a) development of management groups in DRABL and in each of the Agrarian Zones under study, which is a measure of the efficiency of the extension services and of the farmers' adherence to the process.

Group \ Year	1980	1981	1982	1983	1984	1985	1986	1987
D.R.A.B.L.	1	2	2	8	11	23	25	32
Aveiro	1	1	1	4	4	5	10	10
Gândaras	0	1	1	2	4	9	10	10

b) evolution of management groups into management centers, demonstrating the dynamic effect of the work and the will of the farmers to take into their own hands the direction and management of

their own organizations. As mentioned before, two instances of management groups becoming centers have already been confirmed.

c) adherence to the method by the agricultural cooperatives of the region, who through two of their unions adopted the management group method for technical assistance to the farmers. Nine of these groups have already been formed in DRABL. To support the initiative of the agricultural cooperatives, the official extension services have educated the specialists of these organizations in accounting and management materials.

d) development of the technical-economic indices: the improvement and introduction of new technologies; and the number and diversity of the themes discussed in group meetings.

Presented below is the development of some of these indices from 1980 to 1986, as created in the nucleus of eight farmers from the Management Group of Murtosa, presently a Management Center, the first to be organized in the region:

	1980	1981	1982	1983	1984	1985	1986	Δ 1980/86
%of farmers in silage production	63	88	88	100	100	100	100	37
%of farmers using fertilizers with:								
nitrogen	100	100	100	100	100	100	100	
sulfur	75	100	100	100	100	100	100	25
potassium	62	75	100	100	100	100	100	38
fertilizer units per ha in fodder corn								
nitrogen	122	111	143	172	165	202	206	84
sulfur	45	66	118	113	112	78	84	39
potassium	38	65	99	103	93	77	82	44
CN/SAU	2,90	3,40	3,90	4,47	4,55	5,49	5,95	3,05
liters of milk/cow/year	3 033	2 929	3 139	3 068	3 252	3 637	3 597	564
liters of milk/ha of SAU	5 150	5 535	6 032	7 443	7 486	9 864	11 175	6 025
Total liters	383 161	455 834	486 974	553 731	581 702	766 485	842 020	458 859

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Among the innovations and technological improvements to which the farmers adhered are the following: soil analysis and correction; improvement of and balance in fertilizers; improvement of winter fodder; introduction and/or increase of temporary pasture lands, corn for silage, sorghum for fodder and some alfalfa cultivation; adaptation, improvement and construction of cattle buildings and milking parlors; acquisition and routine use of machinery and farm implements; regular study/observation visits on days when demonstrations are conducted; increase in concern for the genetic improvement of cattle, etc.

These innovations and improvements were the fruit of dozens of talks and demonstrations directed towards the target groups and the rest of the population, after problems were detected during the analysis of the management of agricultural endeavors and in discussions in the core groups.

e) participation of the management groups in public events, such as the annual fair of the city of Aveiro, the most important agricultural fair of the region and one of the most important in the nation, where farmers present their activities and successes in the management of their agricultural endeavors.

C. Method

In the establishment of and work with the management groups one must not lose sight of the goal of projecting to the target population the conclusions and positive results obtained in working with the groups. One must keep this in mind so as not to run the risk of

perfecting a method that reaches only a small number of people and improves only their quality of life. Rather, the objective is to define a method developed by a concrete group of farmers, who serve both as an experimental base and as active elements of promotion within their community.

In order to create the basic conditions for reaching this objective it is necessary to:

1. map out the zone in the interior in which the agricultural endeavors operate under similar conditions, which will be called a "Homogeneous Zone."

2. select the target population, considering factors such as: how representative the group is of the community in terms of socio-economic and cultural characteristics; the structure of the endeavors and systems of production; how well the group corresponds to the objectives previously outlined.

3. select the target population for their geographic location, characteristics of the agricultural endeavors, characteristics of the farmers themselves or the community from which the members of the group will be chosen.

4. do the actual selection of the target population, and in the chosen communities, select the farmers who will form the management group.

5. use a method with the group that permits the easy collection and treatment of data from the endeavors, and fosters cohesion and a group dynamic.

We will now look more closely at each of these phases.

1. Delineation of the Homogeneous Zone

The region of operation may be selected on the basis of one of several factors: the region presents problems which need to be addressed: the implementation of a project for the development of certain agricultural activities; or establishment of an extension service for the first time in this region. As mentioned previously, a homogeneous zone may be defined as the limits of an area within which agricultural endeavors encounter similar conditions.

The outline and mapping of the homogeneous zone should be done by way of successive estimation, making use of all available information, such as: geographic maps of soils and their capacity for use; climate; agricultural and forest occupation of land; irrigation; aerial photography; official statistics or studies of the structure of agricultural endeavors (categories of areas, parcelling, mechanization, etc.); systems of production; distance to supply and consumer markets and conversion industries; labor; and socio-economic and cultural characteristics of the population. It is important to always make use of the knowledge of the region that the most experienced specialists possess.

Armed with the largest amount of available information, as well as with cartographic and aerial photography (if any), the technical specialist must do a personal reconnaissance of the zone. This direct involvement of the management specialist and the extension agents in the research and systematization of information and of the mapping of the homogeneous zone is very important for their future work in management and the diffusion of information.

The mapping of the homogeneous zone is accomplished by the superimposition of various maps (soil, capacity, agricultural/forest areas, etc.), which have been previously transferred to transparencies. This permits the identification and outlining of areas with traits in common.

2. Selection of the Target Population

In order to select the target group of farmers from which the management group will evolve, the existing data must be used in accordance with a number of parameters to create groups with similar characteristics, which are then organized into a hierarchy. The goal is to obtain the maximum benefit possible for the community from the activities of the management group.

The criteria for organizing a hierarchy of groups are:

--the number of agricultural endeavors per group.

--the representativeness of the group (in relation to the agricultural endeavors of the community) and potential repercussions of the activities in these endeavors on the farmers and on other groups.

--the persistence of the group and possibility for change in their endeavors in the short run and beyond.

--the need for change.

The following parameters are important in characterizing the groups: quantity of area of the agricultural endeavors; type of endeavor (large landowner or family operation); full-time or part-time; form of endeavor (on one's own or lease); systems of production; irrigation or non-irrigation, etc.

While one must utilize all available sources, such as statistical information and information gathered from studies, when these do not exist or are scarce, research will be necessary.

After collecting the information, tables are compiled using the parameters which characterize the different groups, from which the group to be selected is determined.

It is helpful to take a concrete example from a community (parish) in the interior of the country where the aim was to intensify milk production through the increased production of fodder in the outer limits of irrigation.

So that this undertaking would have a greater possibility of success, it was determined at the beginning that this would be tried with the family farm endeavors, and within that type of endeavor, work would be done only with those families whose yield proved to derive exclusively or primarily from work on their own agricultural endeavor, which have been designated here as full-time family operations.

With the available statistics the following tables were created:

Table 1: Interaction of Type and Form of Endeavor

Type \ Form		on one's own	lease
large landowner	40	10	30
full-time family	100	60	40
part-time family	300	300	-
Total	440	370	70

Table 2: Interaction of Type and Quantity of Area

Type \ Quantity/area ha	>1 a 5	>5 a 10	>10 a 20	>20
large landowner				40
full-time family	30	60	10	
part-time family	250	50		
Total	280	110	10	40

Table 3: Interaction of Type and Existence of Irrigation

Type \ Irrigation	Irrigation	Non-irrig.	Mixed
large landowner	10	25	5
full-time family	60	10	30
part-time family	80	70	150
Total	150	105	185

Table 4: Interaction (within full-time families) of Quantity of Area and Existence of Irrigation

Full-time families \ Quantity of area ha	> 1 a 5	> 5 a 10	> 10 a 20
irrigation	10	50	
non-irrigation			10
mixed	20	10	

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In this particular case, in light of the initial information and circumstances, the endeavors of full-time families on their own (Table 1), with areas of between five and ten hectares (Table 2), with irrigation (Table 3), and with irrigation in the quantity of area between five and ten hectares (Table 4) were chosen.

This rendered a group of fifty agricultural endeavors, of which a group of about fifteen farmers were selected to comprise the management group.

In order to more deeply influence the development of the community within this same case, another group would have to be formed, consisting of part time agricultural endeavors by families on their own, with areas of between one and five hectares, with some or no irrigation (mixed), since this is more typical of this zone.

3. Selection of the Communities

With the region of operation chosen, the homogeneous zone defined, and the target populuation chosen, the next step is the determination of the communities from which the farmers will come who will form the management group.

This choice is important since the communities must be representative of the characteristics of the target population and in the case of having more than one community, they must be geographically close, with good mutual accessibility, so that travel by farmers back and forth for meetings will be as easy as possible. The state of relations (friendly or not-so-friendly) among these communities must also be taken into consideration.

As can be seen, the members of a group can belong to a single locality (local), or to more than one locality (interlocal). This will have an influence on the group, as is described below:

The advantages of a local management group are as follows:

--greater familiarity among group members and their families;

--greater knowledge on the part of members of other members' endeavors;

--rapidity and facility in action;

--better acceptance on the part of the community of solutions proposed by the group;

--more mental resources for the analyis of data;

--easier maintenance of the group, with complementary activities by the extension;

--easier for the extension agent to call meetings and accomplish tasks with the group;

--normally, greater ecological homogeneity of the endeavors;

--better knowledge of the local pressures and difficulties to which the group and its members are subject;

--easier for members to travel and attend group activities.

The advantages of interlocal management groups are as follows:

--faster diffusion within the target area of the group's activities;

--greater ease in selection of people and endeavors;

--a wider view of the problems through the existence of a richer range of solutions;

--greater exchange of experience;

--less social control or pressure;

--group members are more effective in fostering new groups.

The advantages of local management groups do not pertain to interlocal groups, and vice versa. A management group should not reach into the operation area of more than one extension agent in order to avoid the question of who is to assist the group, among other things.

4. Organization of a Management Group

4a) Formation of the group

This is an extremely important stage in the life and success of the group. Since participation has to be voluntary, the members of these organized and structured groups must be the catalysts of all changes towards development.

So that the group may become permanent and dynamic, it is necessary for its members to hold in common certain characteristics, that not only allow the group to work together, but also facilitate this, such as:

--decision-making ability;

--positive attitude towards and capacity for change;

--similar level of schooling;

--mutual affinity and confidence in the group, as well as with the technical specialist;

--acceptance and integration into the group and into the community to which they belong;

--capacity to work in a group;

--not having nor representing interests contrary to those of the group;

--continuity of the effort through age and succession.

Having all available information regarding the homogeneous zone and the target group, as well as knowledge of the traits to which the future members of the management group should adhere, the next step is the selection of and contact with the farmers.

This task is not always easy due to the anonymity of the statistical data; unless an inquiry or research has been done (which is not always viable either), there are characteristics on one hand, and farmers on the other, and one cannot always match up the two.

In practice, various ways of selecting farmers have been tried in order to surpass this difficulty:

--through extension activities, such as meetings or talks which are intended to sensitize the farmers to management and to group work, calling attention to the characteristics that the endeavors and the members of the group should have. At the end of the meeting, printed matter is distributed to the farmers, which includes questions asking them to summarize their agricultural endeavors and the respective production activities. Those who are interested are asked to come to a future meeting with the questions appropriately completed. With this information the selection process of group members begins;
--through a course, namely in agricultural management accounting, for which members will have already been chosen in accordance with the characteristics previously mentioned;
--selection of an initial group, who, after being informed of the group's objectives, invites other farmers to participate in the future group.

Although the parameters for selection have been previously defined, it must be said that it is important to ensure that cooperation with the group is voluntary and is the result of positive motivation.

Selection begins by choosing a larger number of farmers, twenty or more, so that after the inevitable attrition, a group of about fifteen farmers remains. This number is a compromise between a minimum that justifies the technical specialist's assistance and a maximum that permits a group dynamic to function.

Having chosen the farmers who will constitute the group, the effort of the extension agent will be geared towards keeping the group

motivated, cohesive and dynamic, thus creating the conditions for passage from the stage of formation to that of consolidation.

The management groups considered here are assisted in their activities by an accounting ledger, kept by the farmers themselves, which allows the elaboration of indices for the technical-economic analysis of the productive activities of their agricultural endeavors, which motivates nearly all the group's activity. Since at the time of the group's establishment these statistical data will not exist (since the accounting will take place throughout the year), the farmers are asked to provide simplified information about their productive activities in their agricultural endeavors for the previous year. This allows, albeit in an imprecise way, the technical-economic analysis of these activities and the discovery of problems which can provide material for the group's activities, creating as well an interest and a dynamic in the core group.

4b) Operation of the Group

The operation of the group has as its base the discussion of real problems that affect the agricultural endeavors of its members, whose causes may be found in the group's own endeavors. The basis for this discussion is the data obtained through accounting, which furnishes material for the elaboration of the technical-economic indices and for the determination of the gross profit margins for productive activity and net profit margin for endeavors, that will permit the comparison of activities in the same endeavor, from endeavor to endeavor, and of the final results of the endeavors, as well as finding reasons for the differences.

After having started the accounting of the farmer's endeavor, the technical specialist or the extension agent will go periodically to the farmer's home in order to clarify any difficulties in completing the ledger.

At the end of the agricultural or fiscal year, the management specialist, with the assistance of the extension agent, closes the books and considers the data in order to prepare the technical-economic indices, which will better characterize and allow for evaluation of each productive activity: The gross profit by activity, the total gross profit by endeavor, and the net profit also by endeavor.

Following the collection and consideration of information comes the evaluation of the group, where the indices are introduced into tables of analysis of the endeavors and various activities, in which the endeavors are lined up by decreasing order with the net profits, and the different activities lined up by decreasing order with the gross profits. On page 22 is an example of an analysis table for an endeavor and two analysis tables for activities, that of potatoes and cattle.

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Analysis Table for Endeavors

Exploração Nº	SAU/ha	ACTIVIDADES								Encargos Fixos/ha	Margem Bruta/ha	Margem Líquida/ha
		Vinha		Milho grão		Batata		Bovinos				
		Área	MB/ha	Área	MB/ha	Área	MB/ha	CN	MB/CN			

Analysis Table for Potatoes

Exploração Nº	Área (SAU) (ha)	Área de batata (ha)	Mão-de-obra eventual (dH/ha)	Adubação (UF/ha)				Estrume (kg/ha)	Fitofármacos (ESC/ha)	Semente (ESC/ha)	EV/ha	Produção (kg/ha)	RB/ha	MB/ha
				N	P	K	Total ESC (ha)							

Analysis Table for Cattle

Exploração Nº	Superfície forrageira cultivada				Adubos/SFC (kg)			CN/SFC	Litros de leite/SFC	Alimentos comprados/SFC (ESC)	Assistência pecuária/CN (ESC)	Litros de leite/vaca/ano	Nascimentos/vaca/%	EV/CN	RB/CN	MB/CN
	SAU (%)	Prados SFC (%)	Milharada SFC (%)	Ferra SFC (%)	N	P	K									

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The tables serve one of the most important functions in the group, which is the discussion of the tables in group meetings. It is after the analysis and discussion of these tables and discovery of problems in the activities of the endeavors that the themes for future meetings and activities of the group will emerge.

For purposes of keeping the information in the tables anonymous, the farmers are assigned numbers, which they keep until they no longer wish to remain anonymous. This rule is important in the beginning of the group's existence until the farmers gain mutual trust.

For the organization of the hierarchy of the endeavors, the endeavors are divided into three strata, in accordance with the respective net profits. The best are the "top," the worst are the "bottom" and the rest are "average." For this classification fairly rigorous mathematical computations or a quick method may be used, which separates out the upper 25 percent as the "top," the lower 25 percent as the "bottom" and the remaining 50 percent as "average." At the level of the activities the hierarchy is formed by the respective gross profit margins.

Encouragement of the group is accomplished by the detection and analysis of the weak points, which cause the agricultural endeavors to obtain different results; agents try to persuade farmers at the lowest levels of the scale to adopt techniques and procedures that rendered the best results in other group endeavors. The extension agent must not miss the opportunity to outline the program of activities for the group based on the problems seen, as well as arrange for the next

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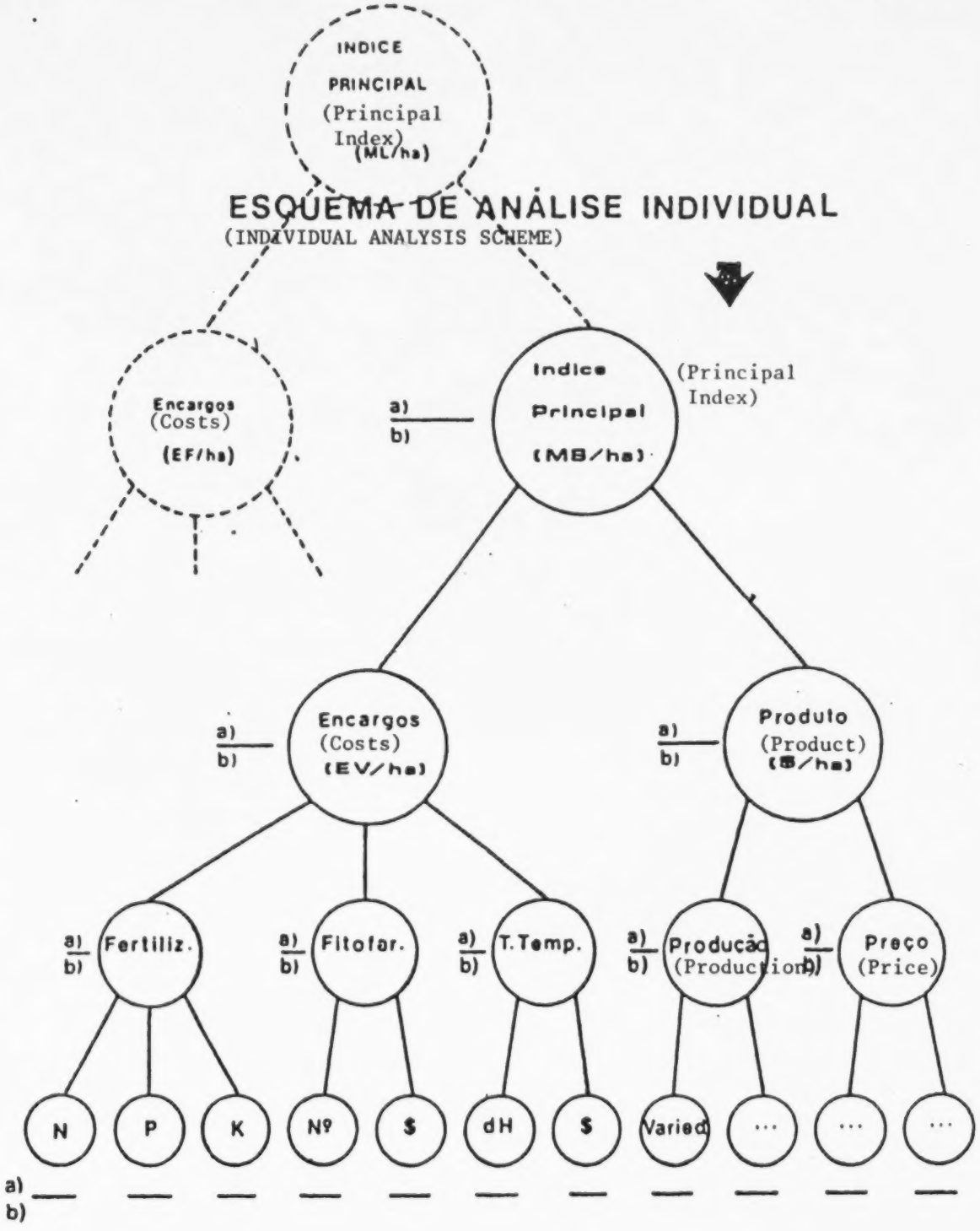
meeting. So that the group may remain dynamic it should participate in meetings or other group activities at least once a month.

After the evaluation of the group and the group meeting, the management specialist and the extension agent should prepare the individual evaluations and should travel to each of the endeavors of the farmers in the group, discussing and making recommendations on how to resolve the problems found. These visits should take place two to three weeks after the group meeting (which, incidentally, should take place four to six weeks after the initial data collection) so that the farmers do not become discouraged and disband.

The individual evaluation may be seen through a scheme of individual analysis, which is given to the farmer with the evaluation and recommendations. The analysis tries to make more concrete the cause and effect relationships among factors of production, and production and results, comparing the indices of that endeavor with the benchmark value, which in the beginning is composed of the indices of the "top" endeavors. On page 25 an example of an individual analysis scheme is presented.

The extension agent should communicate the positive data obtained in the endeavors of the group to the farmers of the target population, and involve them in extension activities, such as talks, demonstrations, excursions, etc., that have as their base the information and achievements of the group.



a) VALOR DO ÍNDICE DA EXPLORAÇÃO (Value of Endeavor's Index)
b) VALOR DA REFERÊNCIA (Benchmark Value)

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4c) Accounting Ledgers

The collection of data for the task of management is accomplished through management accounting by the gross profit margins, since this is the chosen indicator for evaluating productive activities.

Necessary ledgers:

--inventory (Sheets 1A, 1B, 1C, 1D), see page 28

--diary (useful but optional)

--sheet for each activity (Sheet 2), see page 29

--single sheet for fixed costs/general expenses (Sheet 2)

--sheet for calculation of gross profit margin of each planting activity (Sheet 3), see page 30

--sheet for calculation of gross profit margin of each livestock activity (Sheet 3A), see page 30

--sheet for calculation of fixed costs/general expenses (Sheet 3B), see page 31

--sheet for calculation of net profit margin or revenue of entrepreneur (Sheet 4), see page 31

Operation:

--At the beginning of the exercise:

1. prepare initial inventory

2. open an account for each activity and a single account for fixed costs/general expenses

--During the exercise:

Register on the appropriate sheets all that pertains to each activity, whether it be external cash flow (expenses and revenue) or internal cash flow (family consumption, products of own endeavors,

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reemployment, etc.), as well as other information which is very useful for achieving better analysis and management, such as dates of insemination, birth and death of livestock, beginning and end of cultivation operations, sanitation treatments, varieties of seed and fertilizer used, etc.

This is the accounting that farmer will do through the year for gross profit margins.

--At the end of the exercise:

(In the first phase, the farmer and technical specialist can do the work together, as long as the specialist does not dominate it.)

1. Final inventory, variation therein, calculation of depreciation.
2. Transfer sheets into the gross profit sheets:
   a) each planting activity transferred to Sheets 3
   b) each livestock activity transferred to Sheets 3A
   c) fixed costs/general expenses transferred to Sheet 3B
3. Calculation of net profit or entrepreneur's revenue, Sheet 4

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Inventory of Endeavor

INVENTÁRIO DA EXPLORAÇÃO _____ Nº _____

EXERCÍCIO ___/___/_____ a ___/___/_____

1A

Land, Plantings, Construction and Improvements

DESCRIÇÃO	AREA	VALOR DA TERRA	ANO DE IMPLANTAÇÃO	CUSTO	VALOR NO: INÍCIO DO EXERCÍCIO	VALOR NO: FIM DO EXERCÍCIO	QUOTA ANUAL DE AMORTIZAÇÃO

INVENTÁRIO DA EXPLORAÇÃO _____ Nº _____

EXERCÍCIO ___/___/_____ a ___/___/_____

1B

Machinery and Equipment

DESCRIÇÃO	ANO DE AQUISIÇÃO	CUSTO	VALOR NO: INÍCIO DO EXERCÍCIO	VALOR NO: FIM DO EXERCÍCIO	QUOTA ANUAL DE DESVALORIZAÇÃO

INVENTÁRIO DA EXPLORAÇÃO _____ Nº _____

EXERCÍCIO ___/___/_____ a ___/___/_____

1C

Cattle

DESCRIÇÃO	INÍCIO DO EXERCÍCIO Nº	INÍCIO DO EXERCÍCIO VALOR	FIM DO EXERCÍCIO Nº	FIM DO EXERCÍCIO VALOR	VARIAÇÃO DO INVENTÁRIO

INVENTÁRIO DA EXPLORAÇÃO _____ Nº _____

EXERCÍCIO ___/___/_____ a ___/___/_____

1D

Miscellaneous

DESCRIÇÃO	INÍCIO DO EXERCÍCIO QUANTIDADE	INÍCIO DO EXERCÍCIO VALOR	FIM DO EXERCÍCIO QUANTIDADE	FIM DO EXERCÍCIO VALOR	

2

Activity Sheet--Fixed Costs/General Expenses and Revenue

EXERCÍCIO

EXPLORAÇÃO _____ Nº _____

CONTA _____ SUPERFÍCIE _____ Ha.

DATA	DESCRIÇÃO	QUANTIDADE	PREÇO UNITÁRIO	ENCARGOS (DESPESAS)	PRODUTOS (RECEITAS)
	Transporte.....				

Calculation of Gross Profit Margin per Planting Activity

EXERCÍCIO ____ EXPLORAÇÃO Nº _____

CULTURA _____ Superfície _____ Ha

ENCARGOS VARIÁVEIS (DESPESAS)

DESCRIÇÃO	QUANTIDADE	ESCUDOS
Sementes e plantas (Compradas)		
Sementes e plantas (Proprias)		
Fertilizantes		
Tratamentos (Prod. Fitossanitários)		
Mão-de-obra eventual		
Maquinas alugadas		
Outros gastos		
Total (Encargos variáveis)		

PRODUTO (RECEITAS)

DESCRIÇÃO	QUANTIDADE	ESCUDOS
Venda		
Auto consumo (Da familia)		
Reemprego (Na exploração)		
Em armazem		
Total (Produto)		

	ESCUDOS	ESCUDOS
Total (Produto)		
Total (Encargos variáveis)		
Margem bruta		
M B /ha		

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Calculation of Gross Profit Margin per Livestock Activity

3A

EXERCICIO	EXPLORAÇÃO
____	GADO _____ Nº de Cabeças _____ C.N. _____

ENCARGOS VARIÁVEIS (DESPESAS)

DESCRIÇÃO	QUANTIDADES	ESCUDOS
Rações (Compradas)		
Rações (Próprias)		
Forragens compradas		
Mão-de-obra eventual		
Compra de animais		
Veterinário e produtos sanitários		
Reemprego de produtos da exploração		
Outros gastos		
Total (Encargos variáveis)		

PRODUTO (RECEITAS)

DESCRIÇÃO	QUANTIDADES	ESCUDOS
Venda de gado		
Venda de produtos		
Auto consumo (de fêmeas)		
Reemprego (na exploração)		
Total (Produto)		

MARGEM BRUTA	ESCUDOS	ESCUDOS
Total (Produto)		
Total (Encargos variáveis)		
DIFERENÇA		
INVENTÁRIO FINAL		
INVENTÁRIO INICIAL		
DIFERENÇA		
MARGEM BRUTA		
MB/CN		

Calculation of Fixed Costs/
General Expenses

3B

EXERCÍCIO ____	EXPLORAÇÃO Nº _____ ENCARGOS FIXOS	ESCUDOS
	MAQUINARIA	
	Depreciação	
	Combustível	
	Lubrificante	
	Reparações	
	Seguros	
	Outros gastos	
	Soma	
	CONSTRUÇÕES	
	Depreciação	
	Reparações	
	Seguros	
	Outros gastos	
	Soma	
	MÃO-DE-OBRA	
	Mão-de-obra permanente	
	Mão-de-obra eventual em trabalhos gerais	
	Soma	
	GASTOS GERAIS	
	Rendas pagas	
	Contribuições	
	Juros pagos	
	Electricidade	
	Outros gastos gerais	
	Soma	
	TOTAL	

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Calculation of Net Profit Margin

EXERCICIO	EXPLORAÇÃO Nº _____ MARGEM LÍQUIDA DA EXPLORAÇÃO	ESCUDOS
____		

MARGENS BRUTAS

- CULTURA _____
- CULTURA _____
- CULTURA _____
- CULTURA _____
- CULTURA _____
- CULTURA _____
- GADO _____
- GADO _____
- GADO _____
- _____
- _____
- _____
- _____

TOTAL DE MARGENS BRUTAS _____

ENCARGOS FIXOS

- MAQUINARIA _____
- EDIFÍCIOS _____
- MÃO-DE-OBRA _____
- GASTOS GERAIS _____

TOTAL DE ENCARGOS _____

RESUMO

- TOTAL DE MARGENS BRUTAS _____
- TOTAL DE ENCARGOS FIXOS _____

DIFERENCA (MARGEM LIQUIDA) _____

D. Summary and Conclusions

Described here is an experiment in Portugal, which is based on the work of the extension agents with groups of about fifteen farmers, whose dynamism and enthusiasm guides discussions and helps them try to overcome problems in their agricultural endeavors.

Knowledge of the endeavors of the group members is obtained through accounting ledgers which permits the determination of gross profit and the elaboration of descriptive indices of each production activity, from which evaluations are done. For this reason these are called "management groups."

Discussion is conducted in the core group of the analysis tables and the continuance of periodic activities, which always includes problems that arise in the endeavors. These discussions are essential for the creation of a group dynamic.

The extrapolation of group results for the community in question, which should be of indispensible assistance to the efforts of the extension agents, is only possible with a degree of certainty, by having knowledge of the limits of the homogeneous zone and of the target group of farmers to which extension activities are geared.

This system, as with any other extension system, can only be implemented and achieve positive results if it is supported politically and also by attention to information collection and the assistance of the technical specialists of the extension services. In addition, in cases such as the one presented, in which the specialist has to take more initiative in his work with the group, knowledge of the endeavors, the systems of production, the boundaries of the

homogeneous zones, and the socio-economic characteristics of the populations and the groups is essential in order to achieve the desired results. The successes and failures of the effort bear this out.

By Álvaro Soares de Melo
Technical Advisor for the Bureau of Planning and Agriculture
Ministry of Agriculture and Fishery
Portugal

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Face Sheet
World Perspective on Adult Education

Case coordinators should have this face sheet completed for each case description of a current or recent adult education program that is sent for compilation to Alan B. Knox, 264 Teacher Education Building, University of Wisconsin, 225 N. Mills Street, Madison, Wisconsin 53706, USA.

1. Person who prepared this case description

Name Artur F. A. C. Cristovao Phone number (059) 25031-9

Organization University of Tras-os-Montes and Upper Douro
Department of Economy and Sociology

Street Address 5000 Vila Real

City or Town _____ State or Province Portugal

Nation _____

2. Check whether this case is based on

(x) an actual program

( ) a composite based on general familiarity with such programs

3. Write a brief title or name of this program to use to refer to it
The Study of Rural Extension Program Evaluation in the Agrarian Zone of Tras-os-Montes

4. Write the type of program, from Section III of the project plan, in which the program best fits (such as A. Literacy, B. Agriculture, C. Workers, etc). B. Agriculture

5. Type of organization with which the case program is associated (such as Ministry of Agriculture, local school, labor union, university, or clinic).
University

6. Basic characteristics of service area

A. _____ geographic size (such as square miles or kilometers)

B. _____ population (number of people living in area)

C. _____ urban/rural (density of population)

D. _____ worldwide

7. Year(s) covered by the case description 1985

LECTURE SERIES ON
RURAL EXTENSION PROGRAMS/PROGRAM EVALUATION
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University of Evora

THE STUDY OF RURAL EXTENSION PROGRAM EVALUATION IN THE AGRARIAN ZONE OF TRAS-OS-MONTES

Artur F.A.C. Cristovão

University of Tras-os-Montes and Upper Douro
Department of Economy and Sociology
5000 Vila Real, Tel: (059) 25031-9

In a study prepared in 1985/86 we analyzed the development of the extension program in the agrarian zone of Alvão Padrela (ZAAP), one of the zones of Regional Administration of Agriculture of Tras-os-Montes, where this program is considered to have achieved a notable dynamic.

We generally concluded that the extension group from ZAAP was far from being a dynamic focus in the agrarian development of the Zone. Due to contacts maintained through 1986 and 1987 we also verified that the group was little by little losing its membership, that the work was becoming more and more routine, and that the degree of frustration between the participants was growing.

It is in these circumstances that the challenge emerged to attempt an evaluation, which was executed in three work sessions involving the entire local group.

The objectives were: (1) to confront the technicians with the results of the study completed in 1985/86 (2) to provoke thought and dialogue concerning the process of past action (3) combine this process with outlining a plan of action, attempting to renovate the work methods.

This paper describes the experiment, pointing out alternatives for future direction suggested for ZAAP in matters that concern the content of the program and methodology, and discusses the determinative factors that can significantly change the group's course of action.

Finally, it balances the process of evaluation itself, emphasizing its importance in stimulating communication between members of ZAAP, and in increasing consciousness of the problems and the way to supercede them.

INTRODUCTION

In March of 1985 we began a research study of ZAAP as part of preparation for a Ph.D dissertation. The central topic of the dissertation was the participation of farmers in the development of local extension programs. This work, completed at the end of 1985 and defended in September of 1986, allowed us to establish a strong connection with ZAAP, manifested in the commitment to support its actions concerning agrarian and rural extension. It is within these limits that the process of evaluation emerges, described in this paper. The interest of the ZAAP leader and the support of her technicians were decisive in realization of this study.

1. Point of Departure

In the study completed in 1985/86 (Cristovão, 1986 & 1987), we analyzed the development of the extension program in ZAAP, one of the Agrarian Zones of DRATM considered to have achieved a notable dynamic. We drew the following conclusions:

- the work was based on the technicians' view of the farmers necessities and interests, which lacked an ongoing means to plan and evaluate;

- the work was selective and elitist in nature, involving above all the so called "viable farmers"--those working on a larger scale and of higher socioeconomic status;

- the learning opportunities and experiences were limited, putting in question both the efficiency of the extension workers as divulgers of information, and the role of contact farmers within the program as transmitting agents;

- the work with groups and the organization of farmers has not been sufficiently stimulated;

- the preparation of the extension workers was underestimated.

In general, it seemed obvious to us that the extension group from ZAAP was far from being a dynamic focus in the agrarian development of the Zone. Due to the contacts maintained through 1986 and 1987 it also became obvious that the group was little by little losing its membership, that the work was becoming more and more routine, and that the degree of frustration among the extension workers was growing.

2. It is Necessary to Stir Up the Waters

In response to the necessity to change this state of affairs, on the initiative of the supervisor of the Zone, a challenge to organize a development action emerged with two main objectives: (1) to give an account of the situation and (2) to elaborate a draft of a plan for 1988, a new plan, different from those routinely presented in past years.

These are the origins of the study reported in this paper. It is a first attempt, still in a way incipient,

but one that we would like to develop further in the future, in order to establish **a system of planning and evaluation at the Agrarian Zone level**, based on total group participation and the involvement of farmers and other direct interests in local agrarian development.

3. The process - step by step

The study required in practical terms, organizing **three work sessions**, each a day long, involving the entire extension group, including Specialized Credit, Administration and case study agents.
The basic intention was:

- to confront the technicians with the results of the study completed in 1985/86;
- to provoke thought and dialogue concerning the actions of the group, establishing in this way a collective process of evaluation;
- to combine this process with outlining a plan of action, attempting to renovate the work methods.

The three session, summarized on the following chart, were shaped by active intervention of the Zone's

technicians, leaving to us and the chief of the Zone, the role of directing the discussion.

Session 1: Kick off

The work was initiated by a short discussion concerning the objectives of this action, followed by an exposé on the study completed in the Zone in 1985/86. We tried, in an almost provocative manner, to confront the technicians with some statements that they themselves made during the earlier interviews, which revealed their opinion about the farmers and the extension work. For example:

> "In this village we are only interested in two farmers. They are the elite. One has 25 ha. and 75 cows. He has pastures and he plants 4 ha. of potatoes every year".
>
> "There is no interest in visiting this village, the farmers are old and the farming is on the small scale" (the extension worker added that the visit was nevertheless made for reasons of conscientiousness).
>
> "Everything is different with the type of farmers that we have" (the technician was referring to the case of an eight-family village, where, in his opinion, it was not worth doing anything since the farmers were old and subsidized).

PLAN OF THE WORK SESSIONS

Session 1	Session 2	Session 3
1. Why this work? - Chief of ZA - Moderator	1. Extension workers' report on work in the subzones.	1. Report on Program Planning and perspectives for ZAAP in 1988 - Moderator
2. A perspective on extension in ZAAP - Moderator (Results of the study completed in 1985/86)	2. General discussion	2. General discussion
3. General discussion	3. Conclusions and planning of the next session	3. Conclusions: Draft of a plan for 1988
4. Planning of the following session		

After opening the discussion, various opinions were soon voiced. In an open and direct manner, the technicians commented on their own work, disclosing their understanding of the problems. The following expressions are symptomatic:

> "What is going on in the Zone, the people seem to be dead?"
>
> "The first work plan was imposed from above, it was not adapted to reality."
>
> "We are bringing them advice that has no application."
>
> "The investigation does not satisfy the necessities of the region."
>
> "There are small farmers that were not considered."
>
> "What is placed on the notice board (of the village) was never dealt with (during the visits)."
>
> "I have never had a farmer waiting to talk to me about a programed topic."
>
> "The road survey did not have any results; the technicians were discredited in front of the farmers."
>
> "It is necessary to invest in other methods."

In order to focus the discussion, directing it toward a complete balance of the work in subzones, we prepared three note cards that we introduced and distributed to be filled out.

Card 1 asked the extension worker to list his suggested recommendations/innovations for the respective subzone and present a summary of the following results (according to his understanding and knowledge):

- the attitude of the population regarding services;
- proposed recommendations/innovations and an estimate number of adoptees;
- the organization of farmers as a group
- problems solved, minimized, and avoided (individual and collective);
- other results;
- negative consequences;
- actions to be undertaken.

Card 2 asked the extension worker to list the villages visited, the frequency of the visits, the number of "contact farmers" per village (a nominal list), the exemplary fields established, the visits to these fields, and the meetings organized.

Card 3 asked for an examination of the instruction received in 1987, including the new priorities proposed for the instruction process of 1988 and a list of subjects in which the technician considered himself able to give instruction.

Session 2: What did we do?

The second session got underway, beginning with an examination of the ideas expressed by each extension worker while filling out the cards. Each technician presented his conclusions orally while being frequently interrogated by others asking for clarification, attempting to compare results, or questioning the orientation followed by the speaker.

Generally, the discussion permitted the formulation of a set of ideas by consensus regarding the study, specifically:

- the regular activity of the extension, manifested in visits to the village, was frequently interrupted by other activities, namely those regarding the distribution of various subsidies (gasoline, reparatory compensation, etc.).

- the "contact farmers" who were the focus of the visits to the village and other actions, like the installment of exemplary fields, did not function as transmitting agents. Only 39

farmers out of 114 "contact farmers" indicated by the extension worker (one third in total) were noted to function as transmitting agents.

- the work performed in past years was not patterned on the so-called system of Training and Visits (T&V), but rather a model of technical assistance through systematic visits to a group of selected farmers.

In terms of content of topics for study, the technicians regarded as positive (considering the number of adoptees) actions involving the use of fertilizers and correctors (including a performed analysis of the soil) and installation of temporary meadows.

Session 3: What to do?

Session number three intended to outline a plan of action for 1988. The extension workers were advised to use the following weeks to, in a diligent manner, contact the farmers (the "contact farmers" and others, like the presidents and members of the Parish Directory) and interrogate them about local problems and necessities in the domain of agrarian production.

As a result of this project, the transcripts of interviews with about thirty farmers became available. Besides, two of the technicians chose to organize village meetings. "C" organized six meetings involving eight villages and 140 people, and "M" organized five meetings involving 93 people. The latter divided the meetings into two parts; the first one to explain some assistance provided by the EEC, and the second to discuss peoples' fears and expectations concerning the ZA services.

In general, this process, in spite of obvious deficiencies, allowed the identification of some subjects of general interest, namely:

- the exploitation of "mountain water" to irrigate the fields and the improvement of traditional irrigation systems;

- road improvement and the construction of small bridges and washing tanks;

- the construction of collective halls for automatic milking machines;

- the organization of animal health campaigns;

- the necessity to support the purchase of tractors and equipment for collective use (at the village level);

- the improvement of pastures and meadows;

- the necessity to improve the services of the local Agricultural Cooperative ("The Cooperative does not serve the farmers at all. It sets the highest prices." A commentary associated many times with protest regarding the prices of items);

- the necessity to support soil analysis and fertilizer recommendation;

- difficulties with the commercialization of the potato.

The most frequently mentioned was the construction or improvement of infrastructures, such as roads, irrigation systems, milking halls, and public washing places, as well as the necessity of stronger and better support from the Agricultural Cooperative. A curious opinion was expressed by one of the interviewed farmers, preoccupied with the hardship of agrarian work: "See if

you can arrange a way for us to work less."

The opinions concerning the system of visits to the villages were obtained as well:

> "People want a convenient time; coming at 10:00 in the morning or a 3:00 in the afternoon is no good. Of course, this refers to times when there is no problem, because if there is one, the hour is not important."
>
> "Farmers, even if they know that the technician is coming, do not leave their work in order to go to the announcement board."
>
> "Only those who have large-scale farming areas and conditions feel the lack of support from a technician."
>
> "As for the technician's visit, I consider it good but there should be participation from the farmers."
>
> "The technicians are good, only that the farmers keep working and they do not have time."
>
> "He who has problems, should go and consult a technician."
>
> "The one who has a toothache should look for a dentist."

It can be observed that there is an interest in the visits of extension workers, however, the existence of a rigid system which is not concerned with farmers occupations as well as community habits should be questioned.

It is not easy to draw set conclusions from a process of this nature as to what direction to follow.

However, the experience of recent years, namely that drawn from observation and constant contact with villages, allows the establishment of some key areas around which the ZAAP extension program can develop, namely:

- soil analysis, fertilizers, and correctors;
- improvement of pastures and meadows;
- animal production (including preventive actions in the field of health and support for nutrition and management in the country);
- accounting and administration (encouraging the use of assistance appropriation in the process of decision making, specifically through administration groups);
- construction and improvement of agrarian infrastructures (supporting the channeling of community funds to the Zone in conjunction with cooperative organisms and local autonomous governments;
- assistance from the EEC.

In terms of the methodology of action, we consider as essential:

- **diversify the methods**, putting a stronger

emphasis on **group work**. As we stated before (Cristovão, 1986 & 87) farmer groups and organizations have the potential to serve as a basis for broader local participation, namely through the support of planning, implementation, and evaluation of projects and helping to integrate the work of different services and institutions (for example, the Lactimontes and the Agrarian Zone). Besides, by working with various organizations, such as the Association of Irrigation Farmers, Administration Groups, groups of SCOM users, etc., we will have more opportunities to reach a larger spectrum of farmers, contributing in this manner to a stronger relationship with the rural population.
Within this point, it is advisable that each technician organizes at least one collective visit to each exemplary field, as well as village meetings concerning topics of great interest.

- develop the **politics of the agrarian environment**, making the action of the ZAAP group more visible through contacts with autonomous governments, announcements in local

newspapers, organization of informative panels, etc. This will be of particular interest if the plan for the Zone is articulated.

- **establish a viable instruction plan**, based on collective cabinet sessions, field trips, and individual contacts with regional technicians, and academics and investigators from UTAD. We also suggest that the Zone organizes a small Center of Documentation and Information to gather books, brochures, articles, and some periodicals available for subscription. This CDI site, to start, would only need four things: (1) a proper **space** (that is quite accessible), (2) **minimum furnishing** (shelves, table and chairs, file cabinet), (3) **a responsible technician** (a rotating position), (4) **the good will and collaboration of everyone** (in order to gather the available material, including all that being prepared for courses, colloquia, visits, etc.).

- **develop the supervising function of the ZA chief** by reducing the bureaucratic and

administrative burden, and mobilizing energies and capacities to effectively and creatively support the group. A presentation of the supervision plan is suggested, taking into consideration field trips with technicians, regular meetings of report and planning, preparation and coordination of instruction activities, and establishing the agrarian environmental contacts, involving other services and institutions.

- continue the planning and evaluation work, namely the use of systematic surveys of the local situation and the study of the Zone's agriculture(s).

4. Where are we? What do we have to attain?

The evolution of the support services for the farmers from Zone Councils was limited since the establishment of ZAAP and the implementation of a work program and methodology, particularly when we consider what has been invested during those seven years: an appropriate group of technicians (between eight and nine extension workers since 1982, excluding the chief of the Zone and the specialized agents), installations,

vehicles, millions of kilometers driven, an important investment in instruction, and other means, including those provided by projects such as PROCALFER and PDRITM.

We do not intend to analyze here, in depth, the factors (or sets of factors) that led to this relative failure. However, we can indicate those that, in our opinion, were of a significant character:

- the initial study plan from 1981 was essentially prepared at a central level and suffered from a deficient analysis of reality. This analysis focused, above all, on isolated activities. It did not consider the agrarian systems globally, did not identify different types of farmers or farming with different objectives, aspirations, and resources, and in need of different forms of support and diversified technologies. We can understand that the importance of sending a group of extension workers into the field from a new Agrarian Zone in an efficient and speedy manner necessitated a less rigorous planning schedule. We cannot accept, however, the fact that the resulting plan was not reformulated during the subsequent years. In other words, ongoing evaluation and planning was lacking.

- the Zone's action was centered on a limited group of farmers, those whose situation coincided with the extension workers' vision of "viable agrarian entrepreneurs," necessarily small in number. The predominant methodology--individual contact--agrees with this perspective.

In reality, why base the work on group or community actions if we want to address only a limited segment of the population? On the other hand, one can ask if we would have the adequate technologies to offer different types of farmers.

PDRITM (Mountain and Sub-Mountain Valley models) addressing, above all, farmers with an average exploitation area superior to the Zone average and requiring a more intense effort from extension workers could have caused an even stricter selection among the supported farmers. In fact, while the number of the Zone's "contact farmers" exceeds one hundred, the number of PDRITM followers (those that require more regular assistance) does not reach ten.

These factors, referred to here in the context of the Agrarian Zone, cannot be isolated from a larger context, that of the Agriculture Ministry. In fact, the

ZAAP technicians and the DRATM itself are part of a structure that functions on a base of some norms and pre-suppositions. For example, the fact that the project focused on a select group of farmers is not a choice of the Zone; it is a reflection of the dominant perception that stresses the development of entrepreneur-type agriculture and underestimates the importance of small family farming (Baptista, 1987). This perception tries to apply economic rationalism to all agrarian activity and ignores various elements of the rural mentality, such as cultural conditions of the economy in Portuguese rural zones (Lucas, 1987).

On the other hand, the stereotype of farmers' "traditional and backward mentality" has been generalized. As Portela (1984) well observes, "It is common to come across a strong defense of the idea that a lot of our agriculture's problems finds its explanation in the conservative mentality of the farmers, an explanation also used left and right to justify the work with the most 'progressive ones'." All this in a situation where reasons for not adopting technologies are multiple and complex, possibly connected with extension work itself and with the lack of adequate technologies for the farmers' conditions or with market limitations, credit systems, and others (Portela, 1984; Sands, 1986).

A significant change in ZAAP's extension work implies, above all, a different perception of the rural world, which considers cultural variables and their relation to agrarian production. It implies a plurality of perspectives regarding local agriculture and acknowledgement of the existence of different types of farmers and farming with different rationalities. It also implies a critical perception of the technologies that have been already diffused and those that will be proposed, as well as careful attention to the technological necessities of diverse types of agrarian exploitation.

It is obvious that all this cannot be achieved by the Agrarian Zone alone. A compromise on the part of the institutional structure is necessary. Not by chance does Boyle (1981) put in the first category what he calls "organizational and individual commitment," while discussing stages of development in the extension program. In other words, the organizational philosophy is the backbone of a program; within its framework the extension workers function, actions develop, and relations are established. Work strategies, directives, methodologies, and papers will evolve from the organization's philosophy.

From these notes a general conclusion can be drawn: it is possible that ZAAP will improve its work and

correct some of the indicated deficiencies. It is, however, very difficult to foresee a complete change. This will require, to start with, a total compromise of the organization.

5. Closing note

This final note is intended to say something in the way of establishing a balance in the process of collective evaluation described above. It was an experience of the **participatory evaluation** type, since its basis was the involvement of group members in a process of collective examination, attempting in this manner to generate ideas and energies for improvement in the forms of work. The experience, however, had its limitations. The strategy of participation should have included other agents as well, particularly the farmers directly interested in the extension activities. This was only partially achieved and not in a systematic manner through individual contacts and village meetings. Nevertheless, the process made possible the formulation of certain conclusions and brought up several questions, namely:

- an evaluation of this type stimulates the communication between members of a group and

increases their consciousness with regard to present problems. In this manner, it is potentially possible to strengthen the motivation and dedication of the extension workers.

- a process of this nature will only become complete if, besides the extension group, the farmers, cooperative organisms, and local governments are involved as well.

- in a situation of broader participation, as described in the point above, the question arises of which unit should be considered for analysis: the Agrarian Zone as a whole, the Councils individually, of the Subzones which are the responsibility of each extension worker. It seems obvious to us that the first alternative makes the process more complex and difficult to direct. Choosing the subzone alternative, on the other hand, involves the risk of creating many small evaluations which will make the process equally complicated. The Council seems, at first glance, the most equilibrated unit. However, only experience

can provide an indication of the most adequate choice.

- To start with, the situation of larger participation will require more time. This is not necessarily a negative aspect. The time invested in a dialogue between people interested in agrarian and rural development can be compensated for with an increased interest in extension programs and by participation in its development.

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A WORLD PERSPECTIVE:
AN INTERNATIONAL COMPARATIVE ANALYSIS OF EDUCATIONAL PROGRAMS FOR ADULTS

Overview

During 1986-88, adult education scholars and practitioners from more than twenty nations throughout the world will cooperate on a cross-national adult education project. The purpose of the project is to understand the ways educational programs for adults function in society. Cross national similarities and differences will be analyzed and the results reported.

The overall project coordinator is Alan B. Knox, Professor of Adult Education, University of Wisconsin, USA. Working with Professor Knox on the project will be his wife, Linda Bock Knox, an experienced adult educator and writer, who will be helping with data collection and project coordination, and Professor Dušan Savićević, University of Belgrade, Yugoslavia, who will be helping with the comparative analysis.

In each of the nations included in this project an adult educator will serve as a coordinator for the preparation of case descriptions of educational programs for adults important in their nation. Types of programs might include: educational programs focused on literacy, agriculture, workers, continuing professional education, part-time secondary education completion, part-time higher education completion, health, family, leisure, citizen role, and underserved populations.

Each case study will describe the program in terms of its outcomes, process, inputs, past evolution, current influences, and how and why the program functions as it does in its national context. In addition to the comparative analysis and published report of case descriptions by Knox, Knox, and Savićević, each case coordinator will receive a complete set of case descriptions from other coordinators and will be encouraged to conduct their own analysis focused on implications for their own national setting and prepare their own reports. Copies of the project report and case descriptions will be sent to libraries and institutes around the world.

For additional information, contact:

Professor Alan B. Knox
Continuing Education
University of Wisconsin-Madison
264 Teacher Education Building
225 N. Mills Street
Madison, Wisconsin 53706, USA
Phone: (608) 263-2937

NOTE: The term adult education refers to all types of part-time and short-term formal, informal, and non-formal educational activities for all categories of adults about any subject matter content.

A. Purposes of project: to prepare a report that will enable adult educators around the world:
   1. appreciate the wide diversity of adult education programs regarding terminology, activities, and concepts.
   2. understand ways in which such programs function in the society in which they occur.
   3. analyze similarities and differences that can help us recognize options and learn from each other about conditions under which practices produce desirable results.

B. The basic method of the project is in two parts, descriptive and analytic.
   1. One adult educator in each nation participating in this project will serve as case coordinator for that nation. That coordinator may prepare all of the case descriptions of adult education programs for that nation or may cooperate with other people from that nation who may help do so. Prof. Alan Knox (University of Wisconsin, USA) has agreed to serve as overall project director. Each coordinator will arrange for preparation of short case descriptions of typical adult education programs in their nation. The case description will be based on familiarity with the type of program by the person who prepares the case, and may also be based on research or evaluation reports.
   2. Prof. Knox, Prof. Savićević, and other researchers interested in doing so, will conduct comparative analysis based on the case descriptions.
      a. Some of the analyses will be cross national, based on the set of case descriptions, such as literacy, of similar programs in various nations.
      b. Some of the analyses will be based on the set of case descriptions of all programs in one nation or a set of similar nations, and will emphasize programs within a national setting.
   3. The intent is to select nations and programs that are fairly representative, while recognizing that much will be omitted.
   4. The purpose of the guidelines for selection of widespread types of adult education programs and for preparation of case descriptions is to make possible comparative analysis without greatly influencing the conclusions that emerge from the comparative analysis.

Nations to be included - adult educators from about twenty nations have expressed interest in preparing case descriptions for this project. The nations are from all regions of the world [east and west, north and south, large and small]. Together they contain three quarters of the world's population and land area.

Selection of adult education programs for case description - If describing a typical or widespread program in a case that you prepare (or arrange for) in a given category does not reflect the great variation that actually occurs among programs in that category, two or more contrasting cases can be written in that category. All of the comparative analysis and interpretation that occurs subsequently depends on accurate and balanced case descriptions. Such valid cases depend on the detailed familiarity with the program and context by the person who writes the case.

Sections of each case description - Coordinators will arrange for a brief case description (10-20 double spaced pages) for the programs which the coordinator decides to submit. Each case description will be about a typical current or recent local adult education program such as one program coordinator might supervise, and which typically includes a number of teachers. (These cases should not describe either a single teaching episode or an entire national program.) For widespread national programs, select one or more local or regional examples that functions under the supervision of a coordinator. The purpose of the case description is to increase our insight and understanding of how the program functions in its societal context, and not to evaluate it. Special attention should be given to linkage that program staff provide between client systems of adult learners who are served and resource systems of experts and others who help to plan or conduct programs. We encourage you to prepare your case in such a way that if someone else were to do so independently for the same program, the result would be very similar.

Listed below are proposed categories of information for each case example, to facilitate comparative analysis. Each case may describe a typical specific instance, or may summarize average programs based on available information. Formal, informal, or non-formal educational programs may be included, and for each category listed below, a brief paragraph or two should provide a sufficient description and explanation of the essential characteristics of a typical program. Categories A, B, C, and D will constitute a descriptive portrayal of the program as a system.

A. Setting - Type and size of the provider organization, including the size and characteristics of the service area of program.

B. Outcomes
   1. Goals - Program goals, content and intended outcomes (Include the major stated objectives, the types of people and groups that influence goals, and the process of gaining agreement on these goals and objectives. Indicate the main societal benefit that the program tries to serve, such as assimilation of immigrants, increased agricultural production, or modernization of technology).
   2. Benefits - Evidence of actual program benefits to learners and others (based on evaluation findings or general impressions).

C. Process
   1. Planning - Program planning (including who conducts needs assessment and/or context analysis, and how they usually do so, along with other major planning arrangements, such as objectives and activities, and use of plans).
   2. Methods - Methods of teaching and learning (including main types of methods and materials for helping adults learn).

3. Improvement - Program improvement (including evaluation and improving the performance of program staff).
4. Participation - Encouraging participation and responsiveness to learners (including counseling and other ways to retain learners in programs).

D. Inputs - Numbers and characteristics of people and resources that are acquired for the program to function, along with the procedures to obtain them. For example:
   1. Participants (numbers and characteristics of learners or students and average number of hours spent in the program each week)
   2. Needs (indication that a problem or educational need existed that the program should address)
   3. Staff (number of full time equivalent administrators, teachers, discussion leaders, coordinators and other staff members)
   4. Content (major subject matter fields)
   5. Finances (money and in-kind support from any source)
      To describe general levels of financial support and expenditures for this program, estimate the total amount of annual financial and in-kind income and support that the program receives to cover all instructional and other direct program costs. (Do not include indirect costs.) Using that total budget level for the program as a base, compute and report the percentage of program income and support from government funds, fees paid by participants, and all other sources combined. Also, report the percentage of the total budget that is used to pay staff salary and wages.
   6. Facilities, equipment, materials
   7. Other (including feedback regarding outcomes that influence inputs and process)

E. Evolution - Brief history of major program trends to describe how this program started or evolved, and the major past influences that helped and that hindered its development.

F. Influences - Major current societal influences from the past few years and now that affect stability and change in the program's functioning and outcomes. (Examples could include: financial support, government policies, economic status or conditions, religious or social traditions, available volunteers and staff.) The influences could be local, regional, national, or international.
   1. Positive influences that help or contribute to the program's effectiveness or success.
   2. Negative influences that hinder or make it difficult for the program to be effective.

G. Other - Any other brief comments that help explain how and why the program functions as it does in its societal context. Illustrative comments could include clarification of important variables, indications how how the selected program differs from others of its type in your nation, opinions about widespread values and beliefs relevant to the program (description of important adult education staff roles), and your own perspective and interpretation of activities and meanings. Pertinent articles, reprints, statistics, and bibliographic citations that would clarify the program for readers are also welcomed.